CalJOBS Help Sheet 8

How to Create Follow-Ups in CalJOBS

Prepared by: Research and Statistics Division

How to Create Follow-Ups in CalJOBS

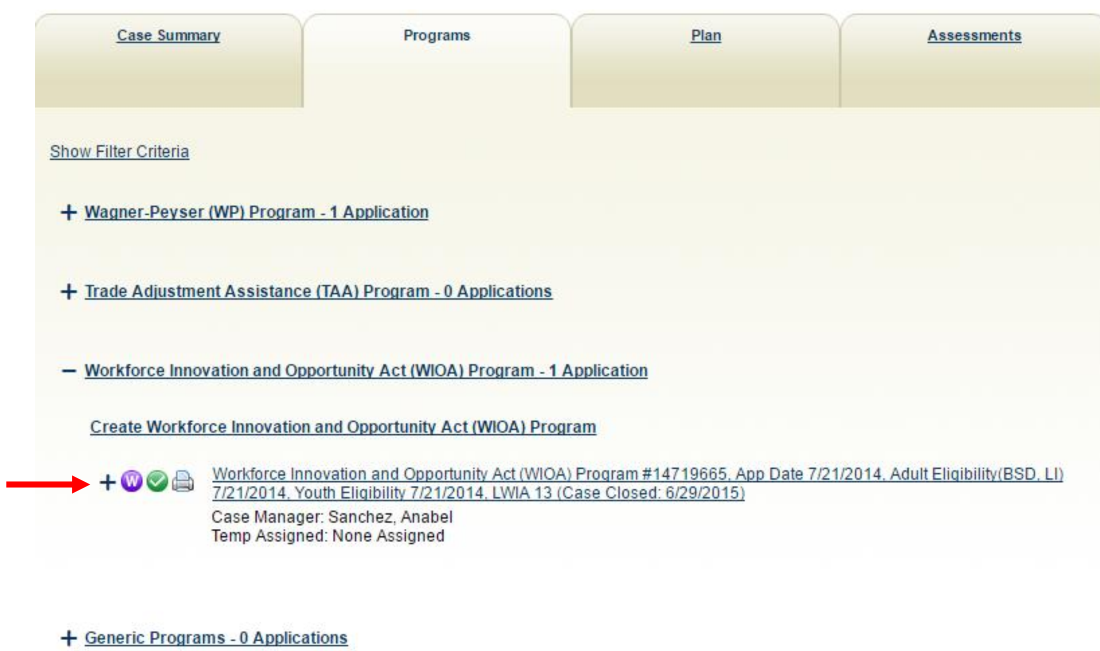
This is a step by step guide on how to properly view, modify, and complete participant follow-ups in CalJOBS.

Step 1:

Creating a Follow-Up

a. Once you have located the participant's WIOA application, expand their information by clicking on the **(+)** located to the left of the WIOA application link. (*Note: Make sure you are selecting the correct application when doing a follow-up as participants may have multiple applications.)*

b. Next, expand the Application by clicking on the **(+)** to the left of the application link.



c. Once expanded, **scroll down** to the “**Create a Follow-Up”** section and select the applicable quarter to create a follow up in the **Follow Up Type** column.

Create Workforce Innovation and Opportunity Act (WIOA) Program

Workforce Innovation and Opportunity Act (WIOA) Program #14719665, App Date 7/21/2014, Adult Eligibility(BSD, LI) 7/21/2014, Youth Eligibility 7/21/2014, LWIA 13 (Case Closed: 6/29/2015)
Case Manager: Sanchez, Anabel
Temp Assigned: None Assigned

Create Participation

Edit Participation for WIOA #14719665 Participation Date 7/21/2014

Create Activity

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
Fundable Activity	416 - Occupational Skills Training - Approved ETPL Provider No Provider Information		301 Youth	08/29/14	08/29/14	08/28/15	05/30/15 Successful Completion
Fundable Activity	427 - Internship - Paid No Provider Information		301 Youth	08/18/14	08/18/14	08/17/15	05/30/15 Successful Completion
	401 - Pre-Employment Training/Work Maturity No Provider Information		301 Youth	07/21/14	07/21/14	07/20/15	08/08/14 Successful Completion
	410 - Leadership Development Services No Provider Information		301 Youth	07/21/14	07/21/14	07/20/15	06/29/15 Successful Completion
	412 - Objective Assessment No Provider Information		301 Youth	07/21/14	07/21/14	07/21/14	07/21/14 Successful Completion
	413 - Develop Service Strategies (IEP/ISS/EDP) No Provider Information		301 Youth	07/21/14	07/21/14	07/20/15	06/29/15 Successful Completion
	414 - Basic Skills Training No Provider Information		301 Youth	07/21/14	07/21/14	07/20/15	08/08/14 Successful Completion

Create Literacy & Numeracy Records

Funct Area - Assess Category	Pre-Test		Year 1 Post		Year 2 Post		Year 3 Post	
	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl
Mathematics - ABE	7/21/2014	6	8/8/2014	7				

Create Closure

Edit WIOA Case Closure for WIOA Program #14719665 Closure on 6/29/2015

Create Outcome

Edit WIOA Outcome for WIOA Program #14719665 Exited on 6/29/2015

Create a Follow Up

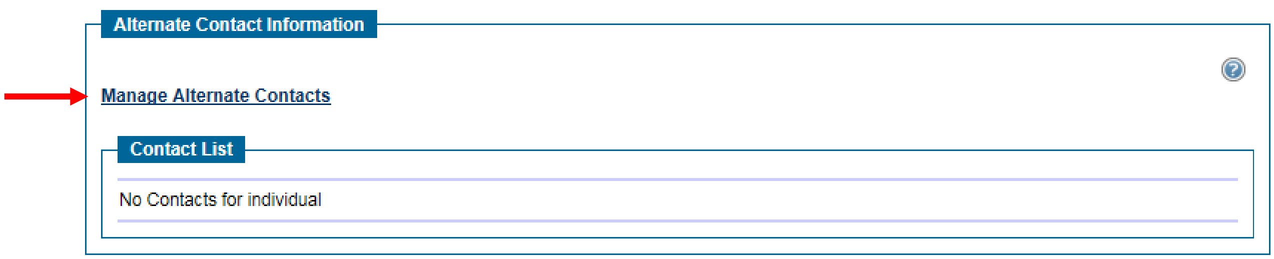
Quarter End Date	Date Complete	Status	Follow Up Type
9/30/2015	4/8/2016	Completed	First Quarter After Exit
12/31/2015		Required	Second Quarter After Exit
3/31/2016		Required	Third Quarter After Exit
6/30/2016		Required	Fourth Quarter After Exit

Clicking on a Quarter under Follow Up Type will open the actual follow up.

Step 2: You have successfully opened the Follow Up Section

a. General Information: The first section is the *General Information* section. The information in these fields should be automatically filled in based on the WIOA Application. However, if the information is missing, please enter the necessary information in the **required** fields.
   - ➔ **Fields with an asterisk (*) next to them MUST be filled out or the report will be rejected.**

b. Alternate Contact Information: If you have any alternate contact information for the participant, you may add a new contact by clicking on *Manage Alternative Contacts*.


Alternate Contact Information

Manage Alternate Contacts

Contact List

No Contacts for individual

c. Exit and Closure Information: This section should also be automatically filled in from the Closure form.


Exit and Closure Information

Exit Date: 06/29/2015

Employment Status: No Closure Employment Information

Attained Credential(s) at Enrollment:

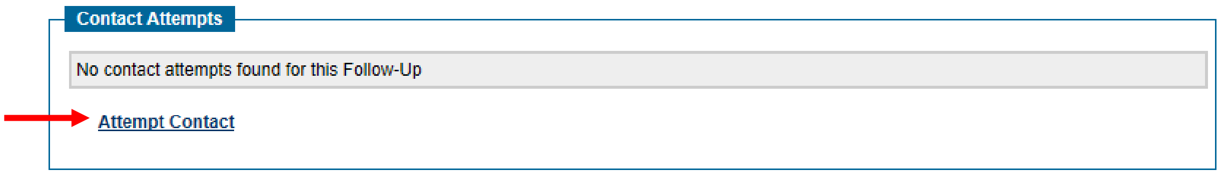
Activity Code	Activity Description	Credential Description	Credential Date
416	Occupational Skills Training - Approved ETPL Provider	Occupational Skills certificate or credential	05/27/2015

Attained Credential at Exit: Occupational Skills License

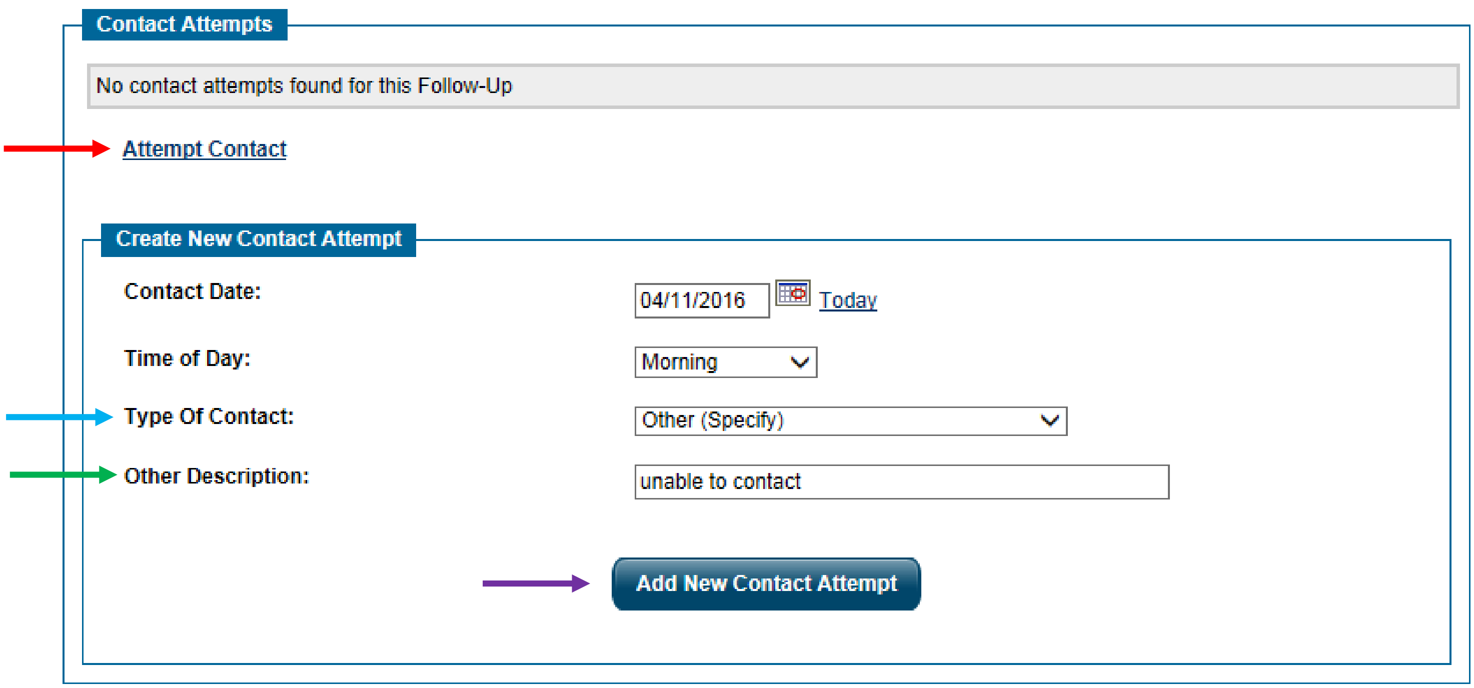
Youth Status at Exit: In-school,post High School

Placement Status at Exit: Entered post-secondary education

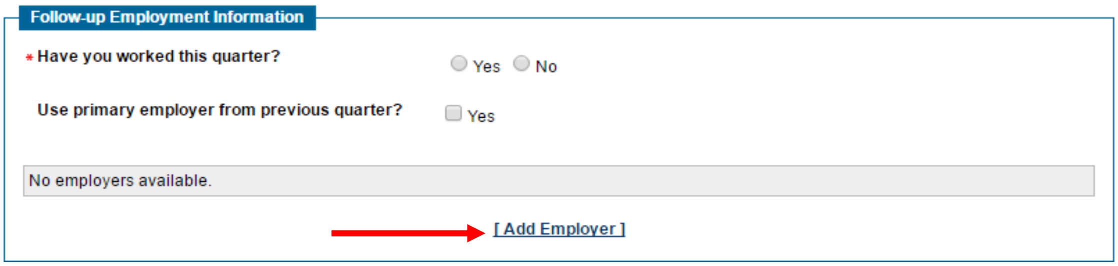
d. Contact Attempts: An attempt to contact the participant must be made when filling out the Follow Up report. Once contact has been attempted, click **Attempt Contact**.



Fill out all parts of the **Create New Contact Attempt** section. If you were unable to contact the participant with the attempt, select “Other” in the **Type of Contact** field and note “Unable to Contact” in the **Other Description** open text. Next, click on **Add New Contact Attempt**. See example below on how to note an unable to contact participant:



e. <u>Follow Up Employment Information</u>: In this section you must fill out whether or not the participant worked in this quarter. If the participant worked, check **Yes** and if they worked with the same employer as last quarter, check **Yes**. However, if it is a new employer you must add the employer by clicking **Add Employer** and filling out the required information.


Follow-up Employment Information

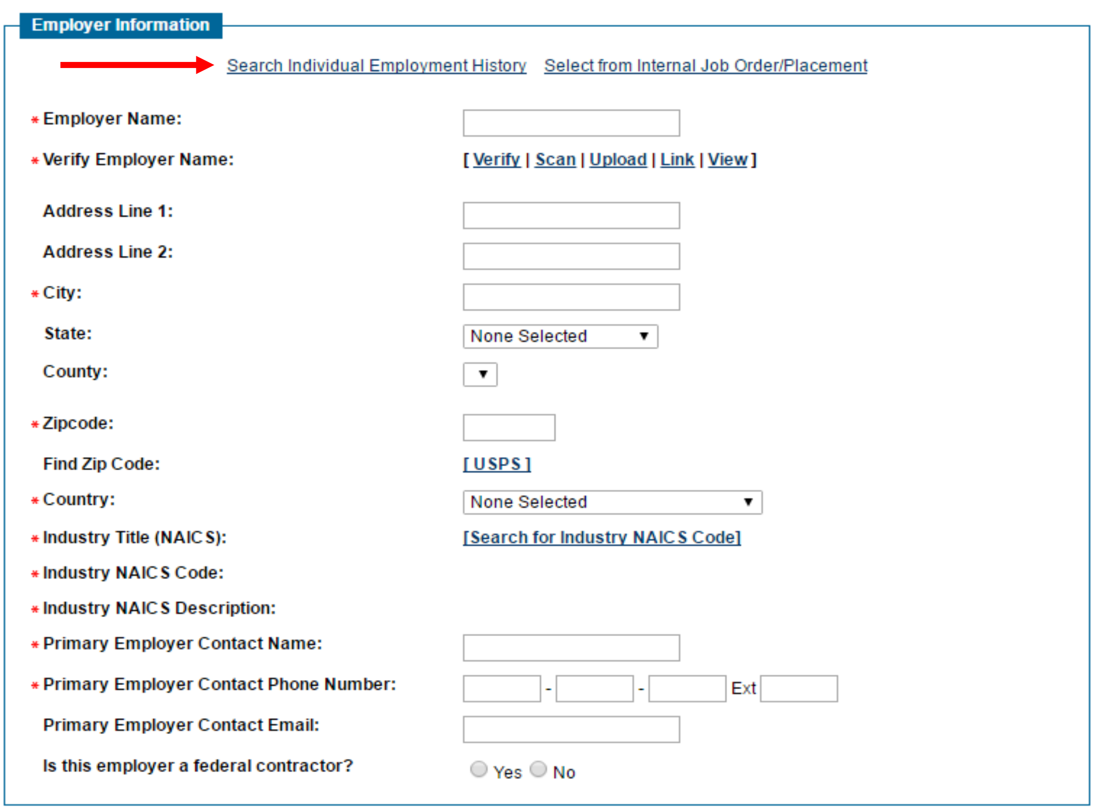
* Have you worked this quarter?	Yes No
Use primary employer from previous quarter?	Yes

No employers available.

[Add Employer]

*If you are uncertain on the participant working and are unable to contact them, you **must** check **No** for the "**have you worked this quarter**" field. Leaving the field blank will result in a rejected Follow up. (*Note: "Use primary employer from previous quarter?" will show for subsequent follow ups in order to alleviate multiple data entry.)*

f. <u>Employment Information</u>: Once you select "Add Employer", the screen will refresh and show Employment and Job information. Although not all fields are required (*), you should fill out as much information as possible. You may click on "Search Individual Employment History" to show suggested employment information or "Select from Internal Job Order/Placement" to view job orders for the participant. You may also search for the Industry NAICS code.

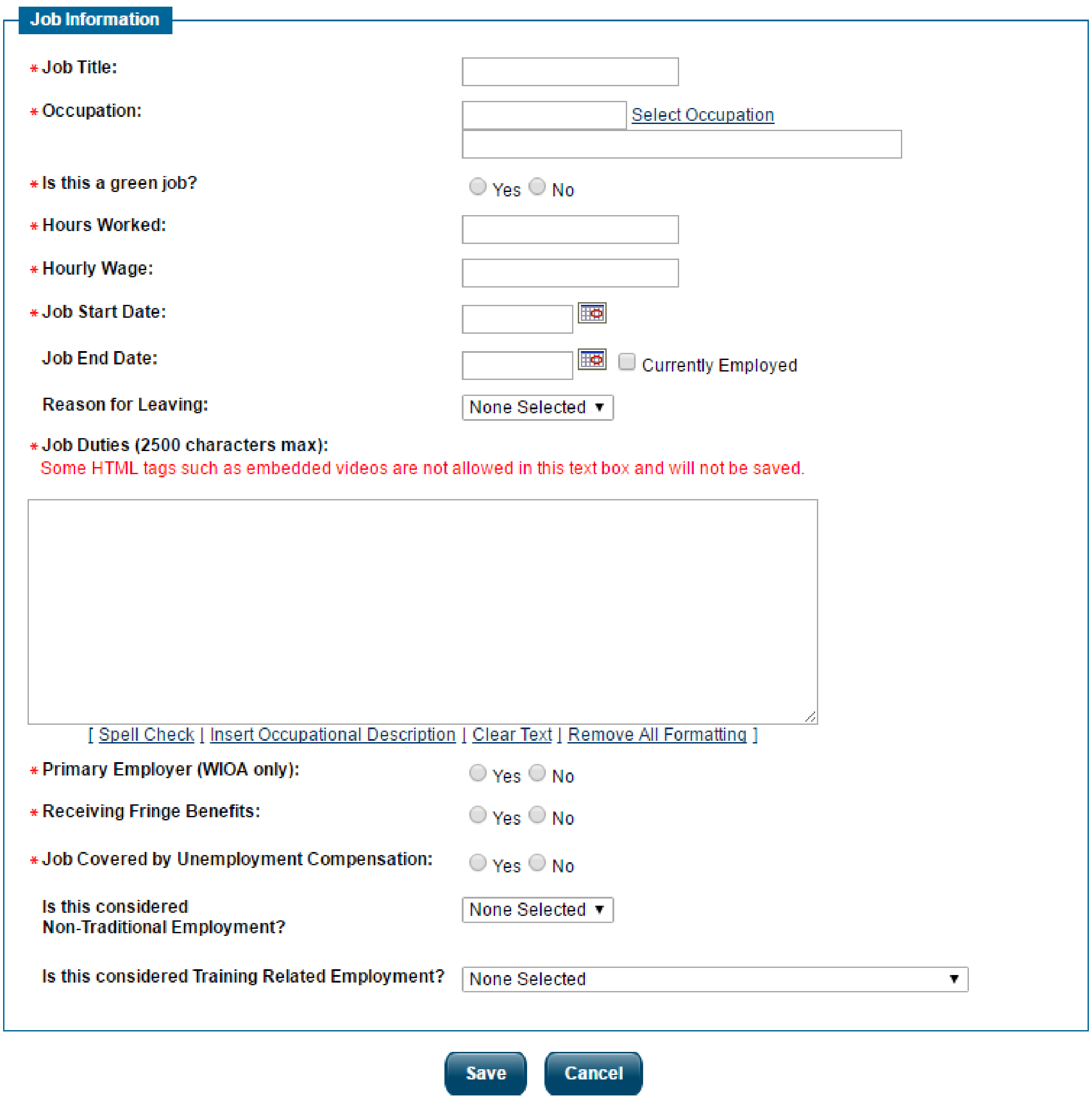

Employer Information

Search Individual Employment History Select from Internal Job Order/Placement

* Employer Name:	
* Verify Employer Name:	[Verify | Scan | Upload | Link | View]
Address Line 1:	
Address Line 2:	
* City:	
State:	None Selected
County:	
* Zipcode:	
Find Zip Code:	[USPS]
* Country:	None Selected
* Industry Title (NAICS):	[Search for Industry NAICS Code]
* Industry NAICS Code:	
* Industry NAICS Description:	
* Primary Employer Contact Name:	
* Primary Employer Contact Phone Number:	- - Ext
Primary Employer Contact Email:	
Is this employer a federal contractor?	Yes No

In the Job Information sections, enter the **Job Title**, **Occupation** and the other job-related questions. You may search for the occupation by clicking on "Select Occupation" link. Check "Currently Employed" if this is the participant's current job status. Click "Save" to finish entering employment information.

> ***Training Related Employment:** You may not modify the training related employment question because this is system set by matching the occupation of the employment information to the training activity occupation on the application. Should there be a mismatched issue, please contact our tech support inbox.



Job Information

*Job Title:

*Occupation: Select Occupation

*Is this a green job? Yes No

*Hours Worked:

*Hourly Wage:

*Job Start Date:

Job End Date: Currently Employed

Reason for Leaving: None Selected

*Job Duties (2500 characters max):
Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

[Spell Check | Insert Occupational Description | Clear Text | Remove All Formatting]

*Primary Employer (WIOA only): Yes No

*Receiving Fringe Benefits: Yes No

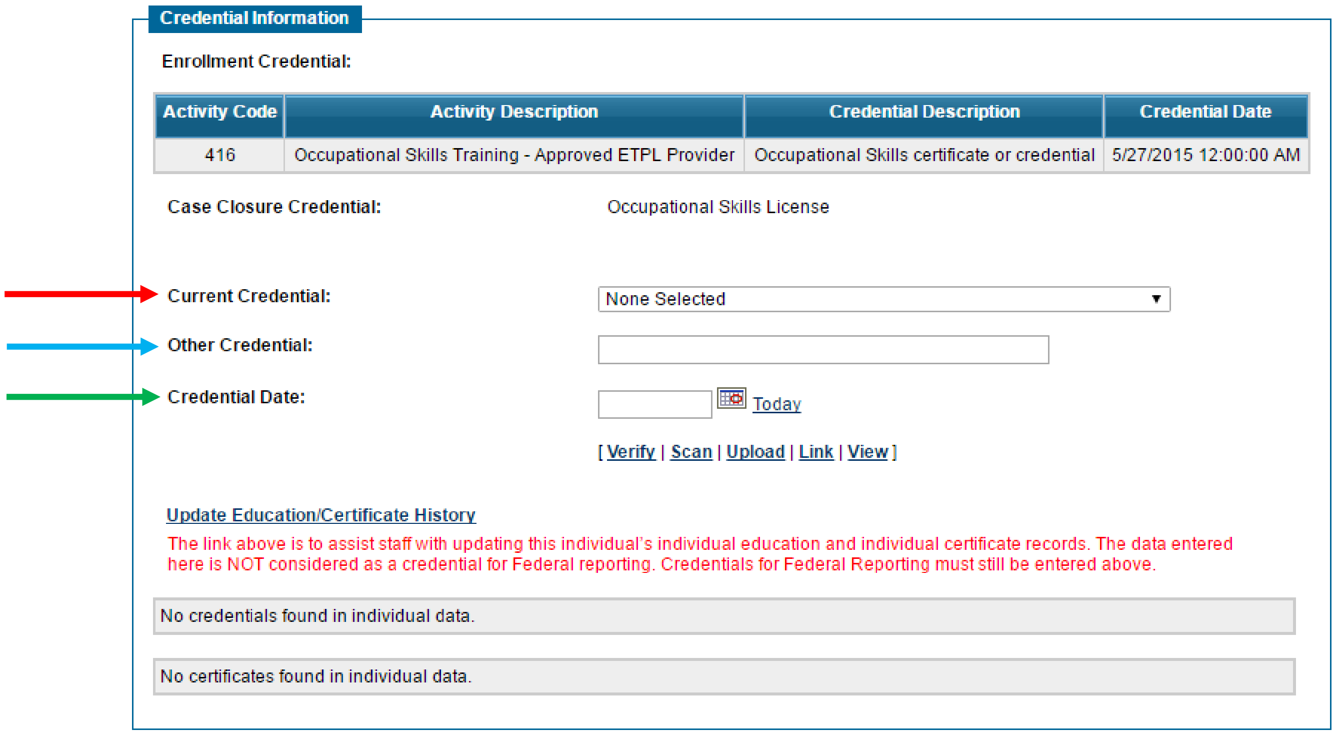
*Job Covered by Unemployment Compensation: Yes No

Is this considered Non-Traditional Employment? None Selected

Is this considered Training Related Employment? None Selected

Save Cancel

g. Credential Information: The participant's **Current Credential** should be selected from the drop down menu. Any **Other Credential** can be entered into the other credential text box. Enter the date the credential was received in the **Credential Date** field. If the participant does not have any credentials, it is ok to leave those fields blank as long you select **None Selected** in the **Current Credential** field.



Credential Information

Enrollment Credential:

Activity Code	Activity Description	Credential Description	Credential Date
416	Occupational Skills Training - Approved ETPL Provider	Occupational Skills certificate or credential	5/27/2015 12:00:00 AM

Case Closure Credential: Occupational Skills License

Current Credential: None Selected

Other Credential:

Credential Date: Today

[Verify | Scan | Upload | Link | View]

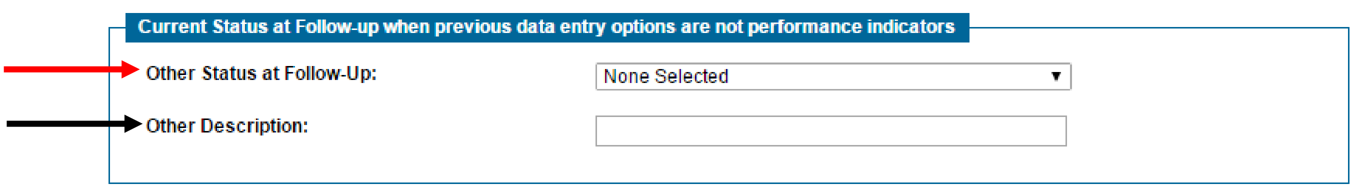
Update Education/Certificate History

The link above is to assist staff with updating this individual's individual education and individual certificate records. The data entered here is NOT considered as a credential for Federal reporting. Credentials for Federal Reporting must still be entered above.

No credentials found in individual data.

No certificates found in individual data.

h. Current Status: The current status of the participant must be selected from the drop down menu in the **Other Status at Follow-Up** field. If the status is not in the drop down list, select "Other (specify)" and specify the status in the **Other Description** field.



Current Status at Follow-up when previous data entry options are not performance indicators

Other Status at Follow-Up: None Selected

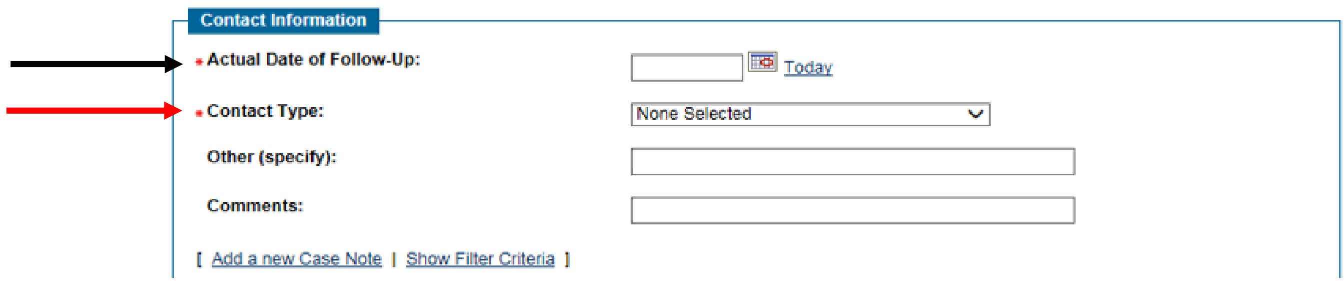
Other Description:

***For participants with exclusionary exits**. If the participant has been globally excluded from the program you will **NOT** need to complete follow ups on that participant. Even if the status of future follow up says pending you can ignore it. However, if they are globally excluded **during** a 1st quarter follow up for example, you would need to enter the information in that quarter's follow up. Exclusionary statuses include institutionalized, Health/Medical, Deceased, Reservist called to Active Duty, Family Care, and Relocated to Mandated Residential Program(youth).

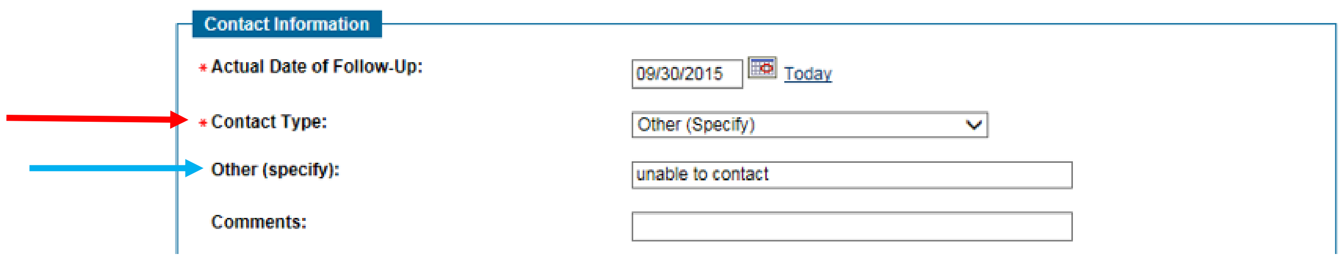
i. <u>Contact Information</u>: When creating a follow up you must contact the participant to get up to date information for the report. In the **Actual Date of Follow-Up** field input the date that you contacted or attempted to contact the participant.

*Even if the date is not in the quarter that this report was supposed to be done, still write in that date. **Do not leave this area blank.**

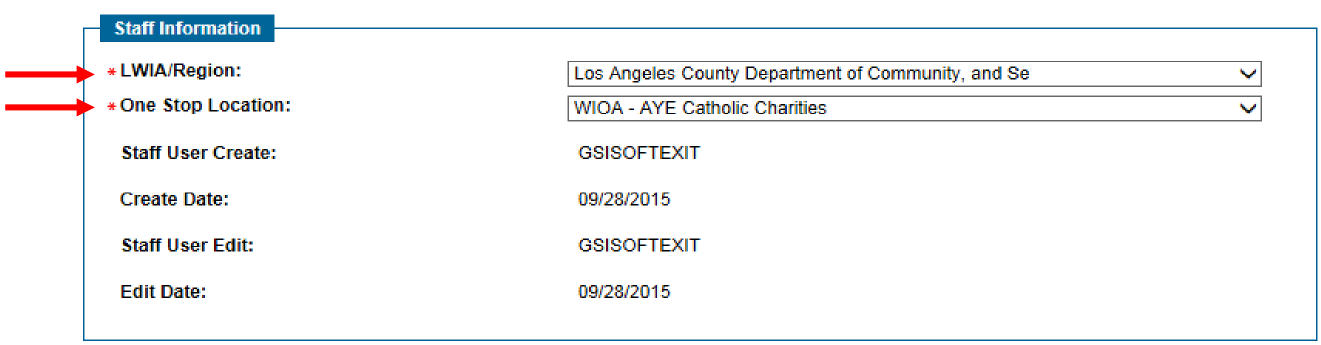
In the **Contact Type** field input what method you used to contact the participant.



If you are unable to contact your participant, select "Other (specify)" in the **Contact Type field and note "Unable to Contact" in the **Other (specify)**. See example below on how to fill out the section when the participant is unable to be contacted.



j. <u>Staff Information</u>: In this section the participant's **LWIA/Region** and **One Stop Location** should be chosen from the drop down menus to correctly reflect the participant's information. Here is an example.



When this section is filled out **AND** you are done with the rest of the follow up, click **save** at the bottom of the screen to save the information.

Step 3: Completing the Follow Up

a. Once you hit save, you will be taken back to the WIOA Application screen where you can check the status of the follow-up. Make sure that you have a **Completed** status on the follow up you just submitted. If the status is **Pending**, this means that an error was made in the follow-up, required information is missing or the follow up was not saved properly.

This means you are done with the report.

Create a Follow Up

Quarter End Date	Date Complete	Status	Follow Up Type
9/30/2015	4/8/2016	Completed	First Quarter After Exit
12/31/2015		Required	Second Quarter After Exit
3/31/2016		Required	Third Quarter After Exit
6/30/2016		Required	Fourth Quarter After Exit

***Important**: Completing follow ups are required to meet contractual obligations. The information entered per quarter represents data for the specific quarter. For example, in the screenshot above, the follow up was completed on 4/8/2016, but the information inputted should be as of 9/30/2015. Even though the participant may have entered employment 10/01/2015, you must enter information as of 9/30/2015. You should not wait for a participant to enter employment or receive a credential to complete the follow up as it would portray inaccurate accurate information for the specified quarter.